AVIATION
INTELLIGENCE+

EUROCONTROL

EUROPEAN AVIATION OVERVIEW

13 - 19 Oct 2025

Thursday 23 October 2025

Headlines

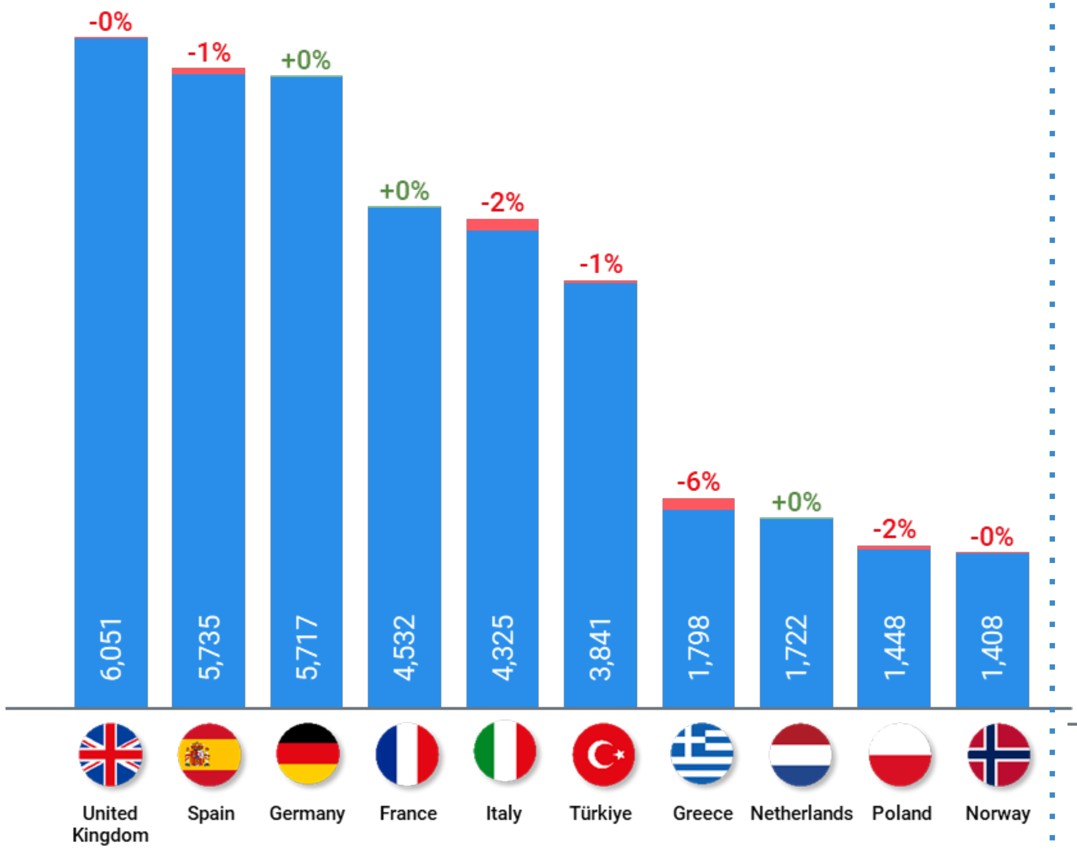
Week 42 (13-19 Oct 2025)

- The network recorded 33,061 average daily flights in Week 42 (+5.4% vs 2024), above 2019 levels (+3.6%).
- Overall, traffic in Week 42 was -0.9% vs Week 41.
- On average, the top 10 carriers operated lower capacities (-0.9%) compared to the previous week. Similarly, the busiest 10 States saw their overall flights decrease by 0.1%.
- Year-to-date traffic is 99.7% of 2019, 4.2% more than 2024, in line at network level with the EUROCONTROL STATFOR traffic forecast of February 2025. The new updated forecast published last week will be incorporated in the next edition.
- Arrival and departure punctuality were 77.5% and 72.3% respectively, in both cases around 4.5pp better than 2024 and around 3.7pp worse than 2019.
- En-route ATFM delays were -22% compared to the previous week, with a daily average of around 43K delay minutes, 10% lower than 2024. Total ATFM delay per flight was 1.9 min/flight (1.3 for en-route and 0.6 for airports).
- ATC capacity/staffing was the top delay cause (79% of all en-route ATFM delays), notably in France, Germany and Spain, followed by other factors (12%) and weather (9%).
- The top contributing Area Control Centres to en-route ATFM delays (in min) were Marseille, Karlsruhe and Barcelona.
- The average jet fuel price closed at 2.08 USD/gallon on 17 October, -5% vs two weeks earlier.

Top 10 busiest States

On week 13-19 Oct 2025

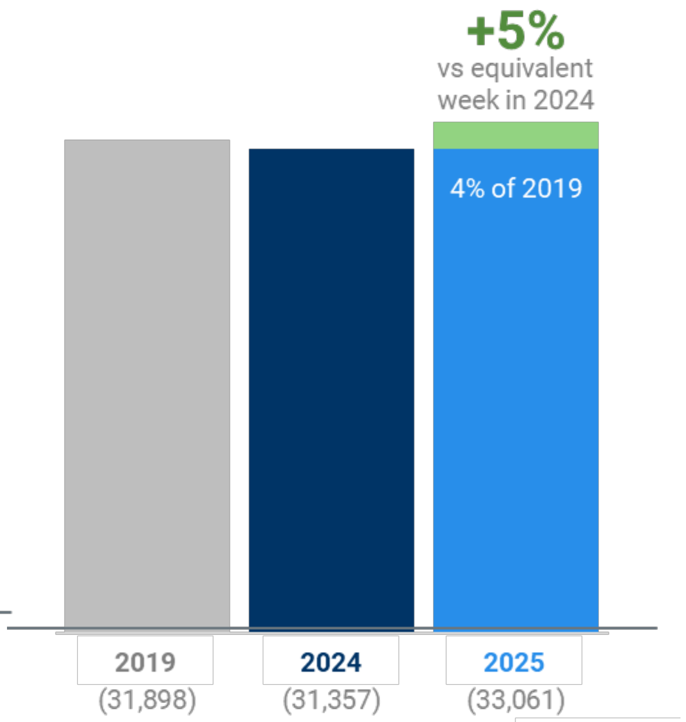
(all flights excl. overflights compared with previous week)



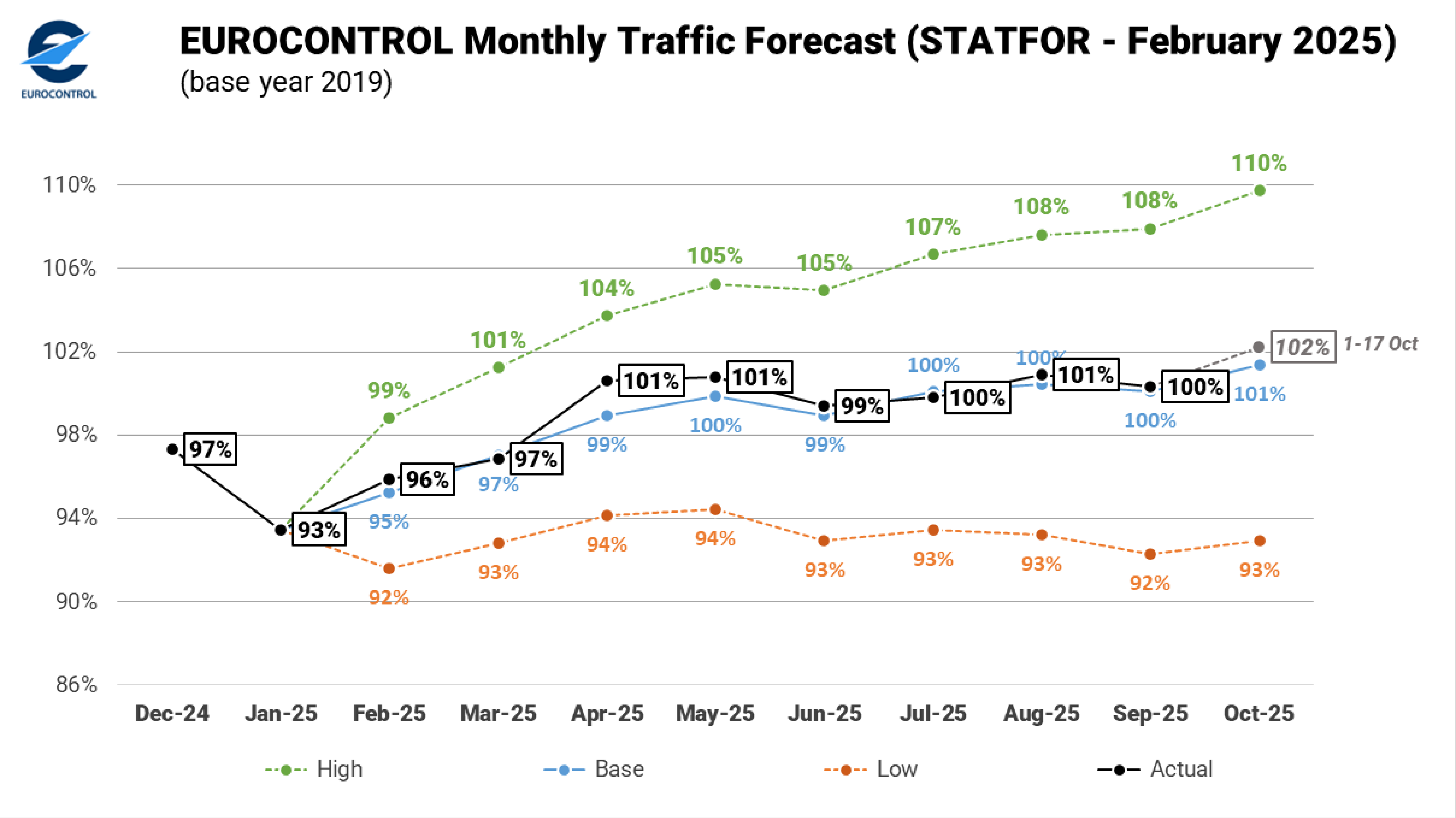
Traffic situation

Average daily flights (including overflights)

Week 13-19 Oct 2025



Overall situation compared to the EUROCONTROL Monthly Traffic Forecast



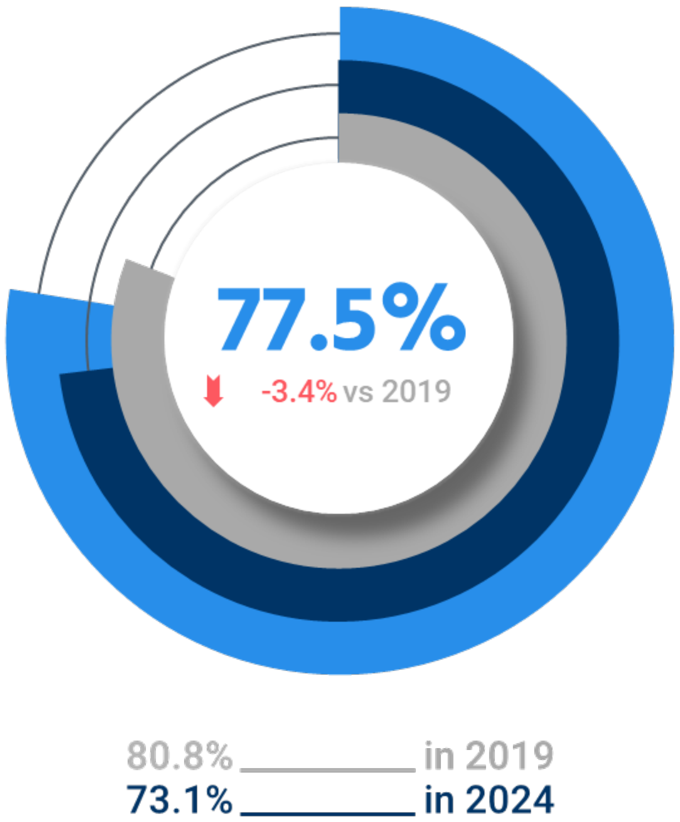
- The latest EUROCONTROL STATFOR flight forecast (2025-2031) was published on 28 February 2025. Since that date, and up to August 2025, European traffic (flights) has evolved largely in line with the Base scenario at network level.
- The updated forecast was published last week and will be incorporated in the next release of the European Aviation Overview.
- The number of flights was exactly the same in September 2025 as in September 2019 and exactly as planned in February.
- The first 17 days of October are currently slightly above the base forecast (+2% vs 2019).
- On a year-to-date basis, network traffic is at 99.7% of 2019, and +4.2% vs 2024.

Arrival & departure punctuality

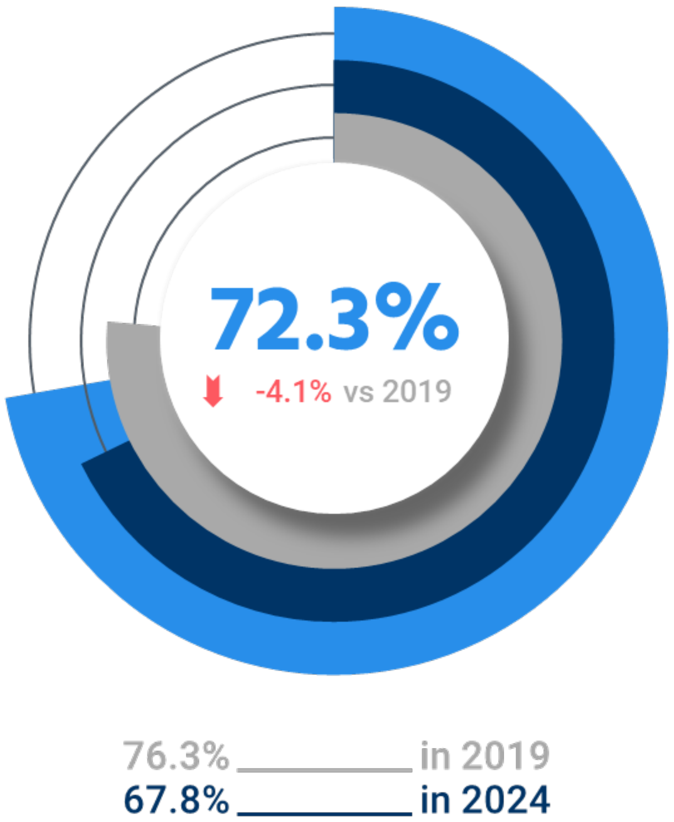
(all network scheduled flights)

Week 13-19 Oct 2025

ARRIVAL PUNCTUALITY



DEPARTURE PUNCTUALITY



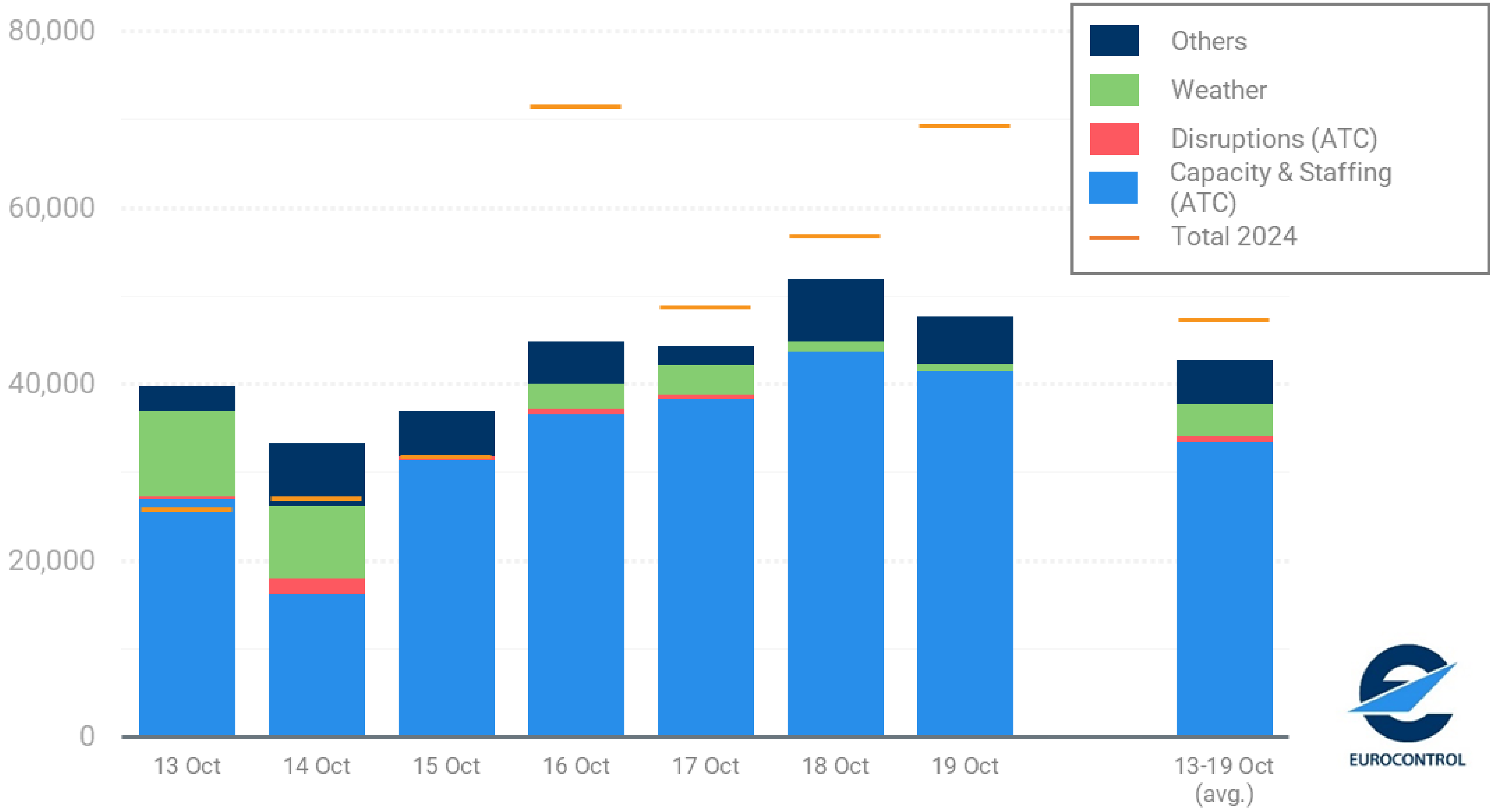
- At network level, arrival punctuality (77.5%) was 4.4pp higher than the equivalent week of 2024; departure punctuality was also higher, 72.3%, +4.5pp.
- Compared to the same week in 2019, both arrival and departure punctuality were worse (-3.4pp and -4.1pp respectively).
- **Nice** and **Tel Aviv** airports saw almost daily ATC capacity delays.
- Throughout the week **Amsterdam** was impacted by Aerodrome capacity delays and **Zurich** by ATFM delays linked to the Target Time Management System (TTMS) trials.
- Despite the relatively low weather delays in the network as a whole, **Palma de Mallorca** saw weather delays throughout the week due to ongoing impacts from with Storm Alice.

The pictures show the share of flights arriving/departing no later than 15 minutes after/before the scheduled time (OTP15).

En-route ATFM delays

Delays per cause (EUROCONTROL Area)

In minutes (total daily and 7-day average) in 2025

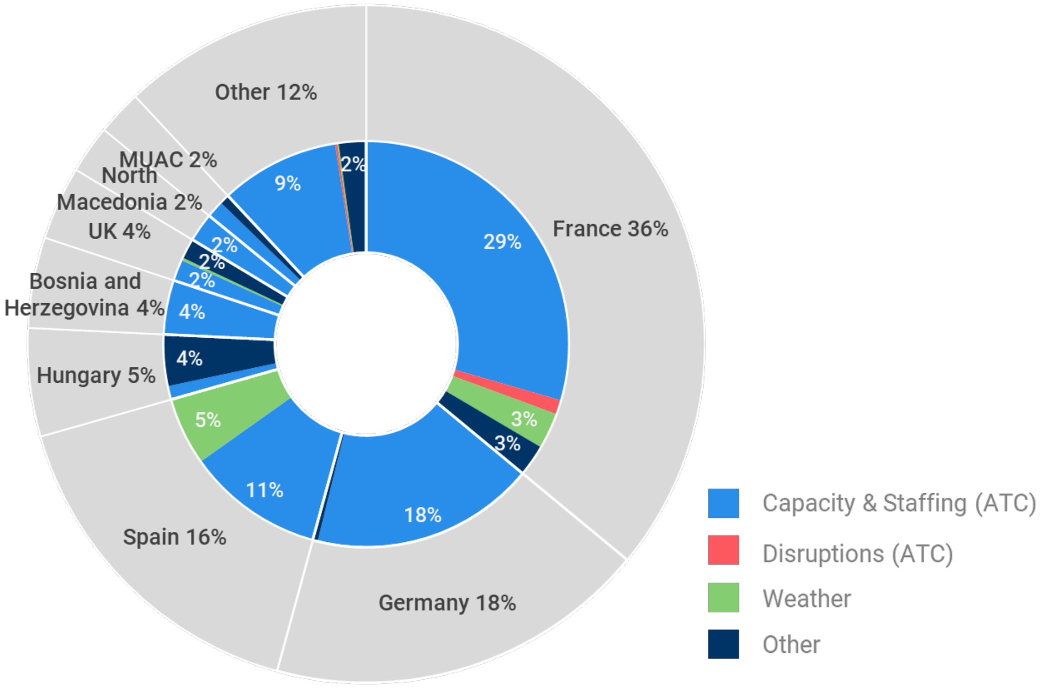


- Week 42 registered lower en-route ATFM delays compared to Week 41 (-22%), with an average of 42,700 daily minutes; this is 10% lower than the same operational week in 2024.
- ATC capacity/staffing were responsible for 79% of all en-route ATFM delays (notably in France, Germany and Spain)..
- Other factors accounted for 12% of all en-route ATFM delays (mainly in Hungary, France and the UK).
- Weather accounted for 9% of all en-route ATFM delays (mainly in Spain and France).
- There were 1.9 minutes of total ATFM delay per flight in Week 42, made up of 1.3 min/flight en-route delay, and 0.6 min/flight airport delay.

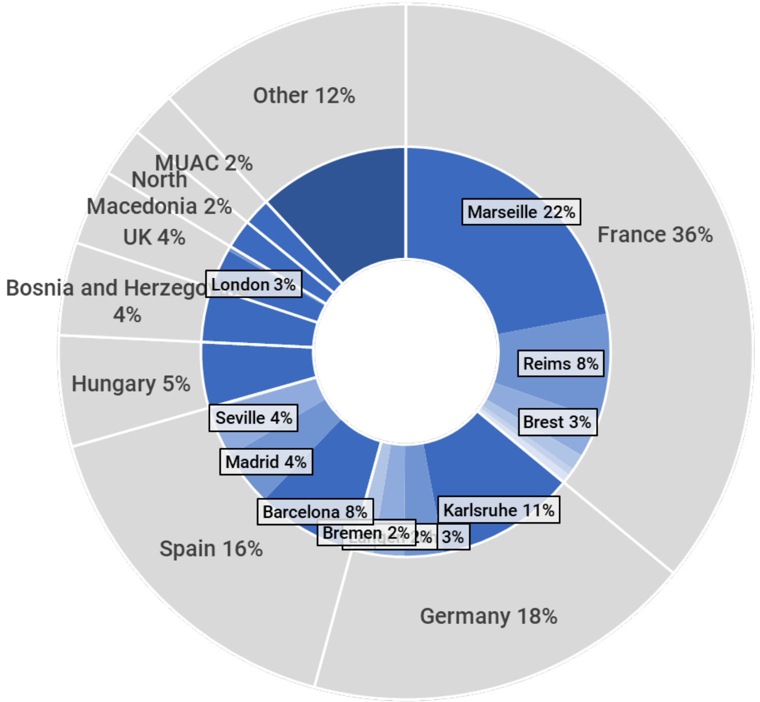
En-route ATFM delays per States per cause & per ACC

Week 13-19 Oct 2025

En-route ATFM delays per cause for top 8 States

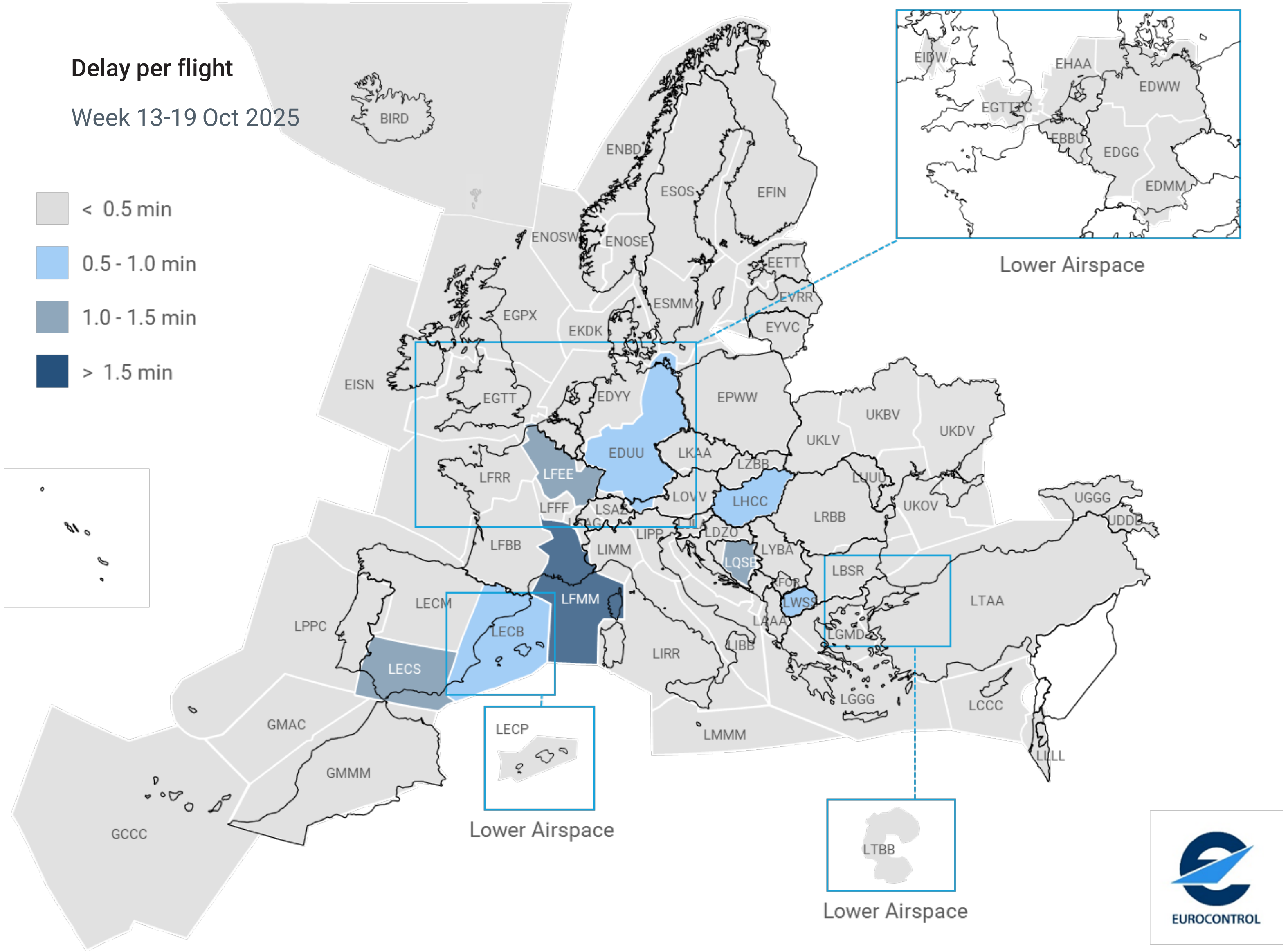


En-route ATFM delays per ACC for top 8 States



- France accounted for 36% of en-route ATFM delays; mainly attributed to Marseille-East ACC (22%) and Reims ACC (8%); mainly due to Capacity&Staffing (29%).
- Germany made up 18% of en-route ATFM delays; these were mainly attributed to Karlsruhe UAC (11%); mainly due to Capacity&Staffing (18%).
- Spain comprised 16% of en-route ATFM delays; these were mainly attributed to Barcelona ACC (8%); mainly due to Capacity&Staffing (11%) and Weather (5%).

En-route ATFM delayed flights per Area Control Centre



In Week 42, five ACCs recorded en-route ATFM delays higher than 1.0 min/flight, amongst which:

- Marseille ACC continued to be affected on a daily basis by notable delays attributed to ATC Capacity and Staffing. Traffic was impacted by weather delays on Monday-Tuesday and Thursday-Friday.
- Reims ACC was affected by daily capacity and staffing delays, with minor weather delays on Monday and Friday-Saturday.
- Sarajevo ACC experienced daily capacity delays, with minor staffing delays on Wednesday-Thursday.
- Sevilla ACC was impacted by daily capacity delays due to limited sector availability, with minor weather delays on Monday and Friday.
- Barcelona ACC saw daily capacity delays, in addition to weather delays on Monday-Tuesday, and Thursday-Saturday.

Top 10 States

Departures and arrivals

Week 13-19 Oct 2025

No.	Country	Average daily flights	% prev week	% prev year	% 2019
1.	United Kingdom	6,051	-0%	+3%	-2%
2.	Spain	5,735	-1%	+5%	+16%
3.	Germany	5,717	+0%	+5%	-8%
4.	France	4,532	+0%	+4%	+1%
5.	Italy	4,325	-2%	+5%	+17%
6.	Türkiye	3,841	-1%	+14%	+24%
7.	Greece	1,798	-6%	+7%	+36%
8.	Netherlands	1,722	+0%	+1%	-5%
9.	Poland	1,448	-2%	+8%	+26%
10.	Norway	1,408	-0%	+2%	-7%

See all States

- The busiest 10 States, in aggregate, recorded 0.9% fewer flights during Week 42 than in the previous week, with three of these States, Germany, France and the Netherlands, posting a small increase (+0%).
- All posted increases in arrivals and departures on the same period the previous year.
- Greece, Italy and Poland recorded the highest decreases among this list (respectively -6%, -2% and -2% on the previous week), owing mainly to:
  - Greece: decreases mainly on flows with the UK, Israel, Poland, Greece and Norway mainly for AEGEAN, Jet2.com, Smartwings and TUI Group.
  - Italy: decreases mainly on domestic flows, and mainly for Volotea.
  - Poland: decreases mainly on flows with Greece, Türkiye and Tunisia and mainly for Enter Air, LOT, Smartwings and Ryanair.
- Compared to 2019, there are wide traffic differences: six States in the busiest 10 recorded traffic between +1% to +36% (for Greece), while four were between -2% and -8%.

Top 10 aircraft operators

Week 13-19 Oct 2025 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,578	-0%	+4%	+42%
2.	easyJet Group	1,808	-0%	+1%	-1%
3.	Turkish Airlines Group	1,682	-1%	+21%	+24%
4.	Lufthansa Airlines	1,171	-6%	-5%	-25%
5.	Air France Group	1,132	+2%	+6%	-7%
6.	Wizz Air Group	997	+0%	+11%	+51%
7.	KLM Group	933	+0%	+3%	+0%
8.	British Airways Group	873	-0%	+4%	-8%
9.	SAS Group	780	+0%	+11%	-14%
10.	Eurowings Group	664	+10%	+16%	-7%

See top 40 airlines

- The busiest 10 aircraft operators, in aggregate, recorded a slightly lower number of flights (-0.1%) compared to the previous week.
- Five of the ten busiest aircraft operators decreased their capacity compared to Week 41, while five groups (Eurowings (+10%), Air France (+2%), Wizz Air, KLM and SAS (+0%)) operated either similar or higher capacities.
- The highest increase on this list saw one aircraft operator, Eurowings, flying +10% vs the previous week, mainly due to domestic flows in Germany from/to Munich.
- The highest decrease on this list saw one aircraft operator, Lufthansa, flying -6% vs the previous week, mainly due to domestic German flows.
- Compared to 2024, the majority of the busiest ten aircraft operators recorded more flights (double-digit rates for Turkish Airlines, Eurowings, Wizz Air and SAS); Lufthansa posted lower flight volumes (-5%).
- Compared to 2019, only four of the busiest 10 aircraft operators (Wizz Air, Ryanair, Turkish Airlines and KLM) operated more flights than in 2019 – and, for the first three, significantly more (+51%, +42% and +24% respectively).

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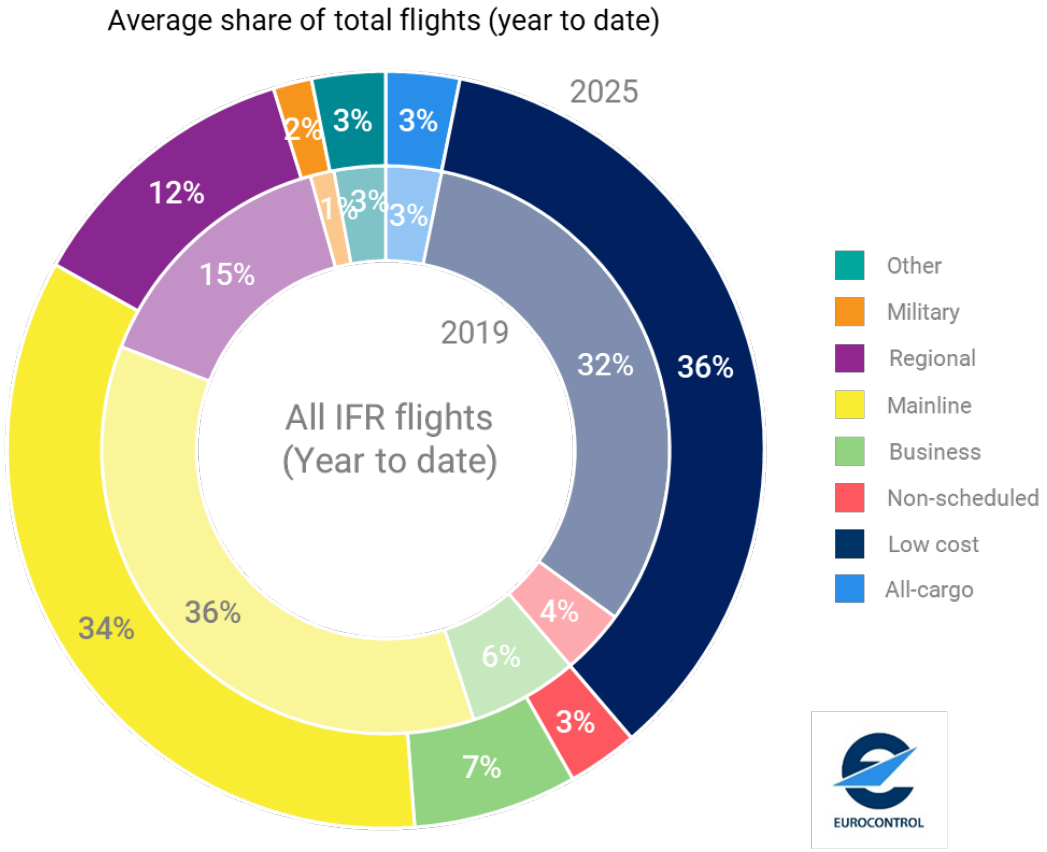
Europe's 6 largest airline groups

Week 13-19 Oct 2025 (avg daily flights)

No.	Aircraft operator	Average daily flights	% prev week	% prev year	% 2019
1.	Ryanair Group	3,578	-0%	+4%	+42%
2.	Lufthansa Group	3,166	-1%	+3%	-9%
3.	IAG Group	2,372	-0%	+3%	-1%
4.	Air France-KLM Group	2,064	+1%	+4%	-4%
5.	easyJet Group	1,808	-0%	+1%	-1%
6.	Turkish Airlines Group	1,682	-1%	+21%	+24%

- The 6 largest European airline groups – i.e. aggregating the constituent members of the Lufthansa, IAG and AF-KL groups to join the Ryanair, easyJet and Turkish Airlines groups from the previous slide – in aggregate recorded a slightly lower number of flights (-0.3%) compared to the previous week.
- Five of the six largest airline groups decreased capacity compared to Week 41, while only one – Air France / KLM Group - increased by 1%.
- Compared to 2024, all recorded more flights, with a double-digit rate for the Turkish Airlines Group (+21%).
- Compared to 2019, two groups (Ryanair and Turkish Airlines) operated significantly more flights than in 2019 (+42% and +24%); two (Lufthansa and Air France/KLM) 9% and 4% fewer; and two (IAG and easyJet) marginally fewer.

Market segments in the EUROCONTROL Network



No.	Market segment	Avg. flights	% prev week	% prev year	% 2019
1.	Low Cost	12,284	+0%	+10%	+23%
2.	Mainline	11,158	-1%	+3%	-0%
3.	Regional	3,894	-0%	+0%	-13%
4.	Business	2,074	-7%	+0%	+16%
5.	Other	1,102	+3%	+21%	+19%
6.	All-cargo	1,040	+3%	+1%	+17%
7.	Non-Scheduled	949	-7%	+2%	-19%
8.	Military	563	-4%	+12%	-9%

- Year-to-date, the largest market segment (low cost) has a 36% share, up by 4pp compared to the same period in 2019. The second largest segment (mainline) at 34% has shrunk by 2pp compared to 2019. The regional market share has shrunk by 3pp too (to 12%), while all-cargo (3%) has a comparable market share.
- Over the previous week, two market segments have recorded positive growth rates: all-cargo (+3%) and Other (+3%). The other main market segments experienced a decrease: regional (-0%), mainline (-1%), military (-4%), business (-7%) and non-scheduled (-7%).
- Four market segments are recording flights above 2019 levels: low-cost (+23%), Other (+19%), all-cargo (+17%) and business (+16%). Mainline is slightly down at -0%, however, non-scheduled and regional recorded double-digit decreases of -19% and -13% respectively.

Top 10 airports

Week 13-19 Oct 2025 (avg daily flights)

No.	Airport	Avg. daily dep/arr flights	% prev week	% prev year	% 2019
1.	Istanbul	1,556	-1%	▲ +13%	▲ +28%
2.	Amsterdam	1,438	-0%	▲ +2%	▼ -4%
3.	Frankfurt	1,414	+1%	▲ +8%	▼ -6%
4.	Paris Charles de Gaulle	1,347	+1%	▼ -1%	▼ -7%
5.	London Heathrow	1,342	-1%	▲ +2%	▼ -0%
6.	Madrid Barajas	1,226	-0%	▲ +8%	▲ +2%
7.	Barcelona	1,070	-0%	▲ +4%	▲ +9%
8.	Munich	1,029	-1%	▲ +5%	▼ -15%
9.	Antalya	957	-1%	▲ +12%	▲ +25%
10.	Rome Fiumicino	941	-1%	▲ +2%	▲ +8%

See top 40 airports

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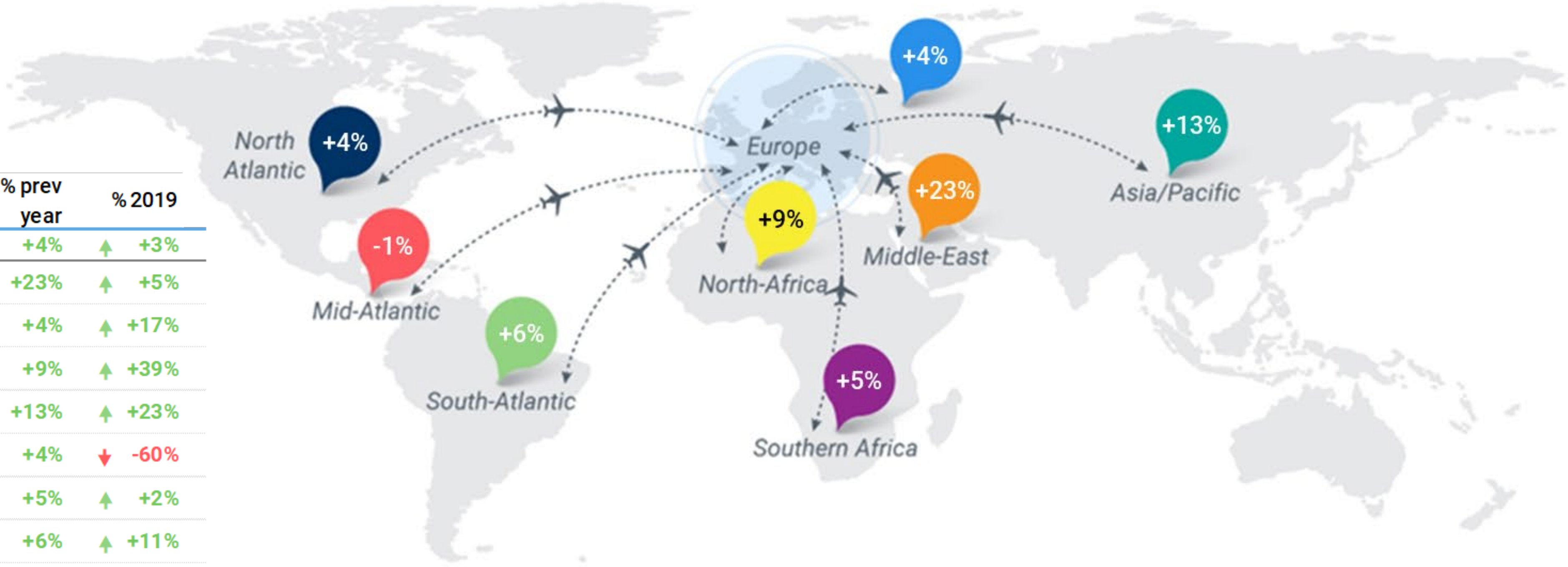
- Istanbul (1,556 flights per day; -1% vs Week 41) remained the busiest airport, followed by Amsterdam (1,438, -0%), Frankfurt (1,414 flights; +1%), and Paris CDG (1,347, +1%).
- All of the ten busiest airports saw numbers of flights relatively stable (just above or just below) compared to the previous week's figures.
- Nine of the ten busiest airports handled a higher number of flights than in 2024, with Istanbul (+13%), Antalya (+12%), Frankfurt (+8%), Madrid (+8%), Munich (+5%) and Barcelona (+4%) recording the strongest rates. Paris CDG was marginally below 2024 levels (-1%).
- Five of the ten busiest airports are currently handling more traffic than in 2019: Istanbul (+28%), Antalya (+25%), Barcelona (+9%), Rome (+8%) and Madrid (+2%). Munich is still firmly below pre-COVID rates on -15%, followed by Paris CDG (-7%), Frankfurt (-5%), and Amsterdam (-4%).

Traffic flows

(average daily departure/arrival flights for week 13-19 Oct 2025)

Region	Average daily flights	% prev week	% prev year	% 2019
Intra-Europe	25,495	-1%	+4%	+3%
Europe ↔ Middle-East	1,537	-1%	+23%	+5%
Europe ↔ North Atlantic	1,509	-2%	+4%	+17%
Europe ↔ North-Africa	1,462	+1%	+9%	+39%
Europe ↔ Asia/Pacific	1,020	+2%	+13%	+23%
Europe ↔ Other Europe	453	-5%	+4%	-60%
Europe ↔ Southern Africa	317	+1%	+5%	+2%
Europe ↔ South-Atlantic	210	-2%	+6%	+11%
Europe ↔ Mid-Atlantic	155	+7%	-1%	+4%
Non Intra-Europe	6,662	-0%	+10%	+4%



- The main intra-European traffic flow saw 25,495 daily flights on average last week, -1% vs the previous week. Intercontinental flows amounted to 6,662 daily flights on average, -0% vs Week 41.
- The second-largest flow is with the Middle East, with 1,537 average flights per day (-1% vs the previous week).
- The third-largest flow currently is to/from North America, with 1,509 average daily flights (-2% vs the previous week).
- The flow to 'Other Europe' (which includes the Russian Federation and Belarus) remains massively reduced,-59% lower than 2019.

Top 10 long-haul country pairs

(average daily departure/arrival flights for the last week)

Week 13-19 Oct 2025

No.	Country pair	Average daily flights	% prev week	% prev year	% 2019
1.	UK ↔ US	325	-1%	+0%	+6%
2.	Germany ↔ US	167	-1%	-2%	-4%
3.	France ↔ US	128	-5%	-6%	+2%
4.	Italy ↔ US	116	+2%	+22%	+54%
5.	Ireland ↔ US	85	+0%	+20%	+30%
6.	Spain ↔ US	83	-1%	+16%	+20%
7.	Netherlands ↔ US	79	-0%	-1%	-5%
8.	UAE ↔ UK	63	-1%	+1%	-3%
9.	Egypt ↔ Russia	55	+3%	+60%	
10.	Türkiye ↔ US	49	+1%	+5%	

- Eight of the top 10 long-haul country pairs are with the United States, the main four being between the US and the UK, Germany, France and Italy. The only non-US-related long-haul flows within the top 10 are between UAE ↔ UK and Egypt ↔ Russia.
- Three long-haul flows posted increases on the previous week: Egypt ↔ Russia (+3%), Italy ↔ US (+2%) and Türkiye ↔ US (+1%). France ↔ US (-5%) posted the largest decreases.
- All but three of the top long-haul flows recorded a positive growth rate vs 2024, most notably Egypt ↔ Russia (+60%), Italy ↔ US (+22%), Ireland ↔ US (+20%) and Spain ↔ US (+16%).
- Five flows are currently at or above 2019 levels, notably Italy ↔ US (+54%), Ireland ↔ US (+30%), Spain ↔ US (+20%) and UK ↔ US (+6%).

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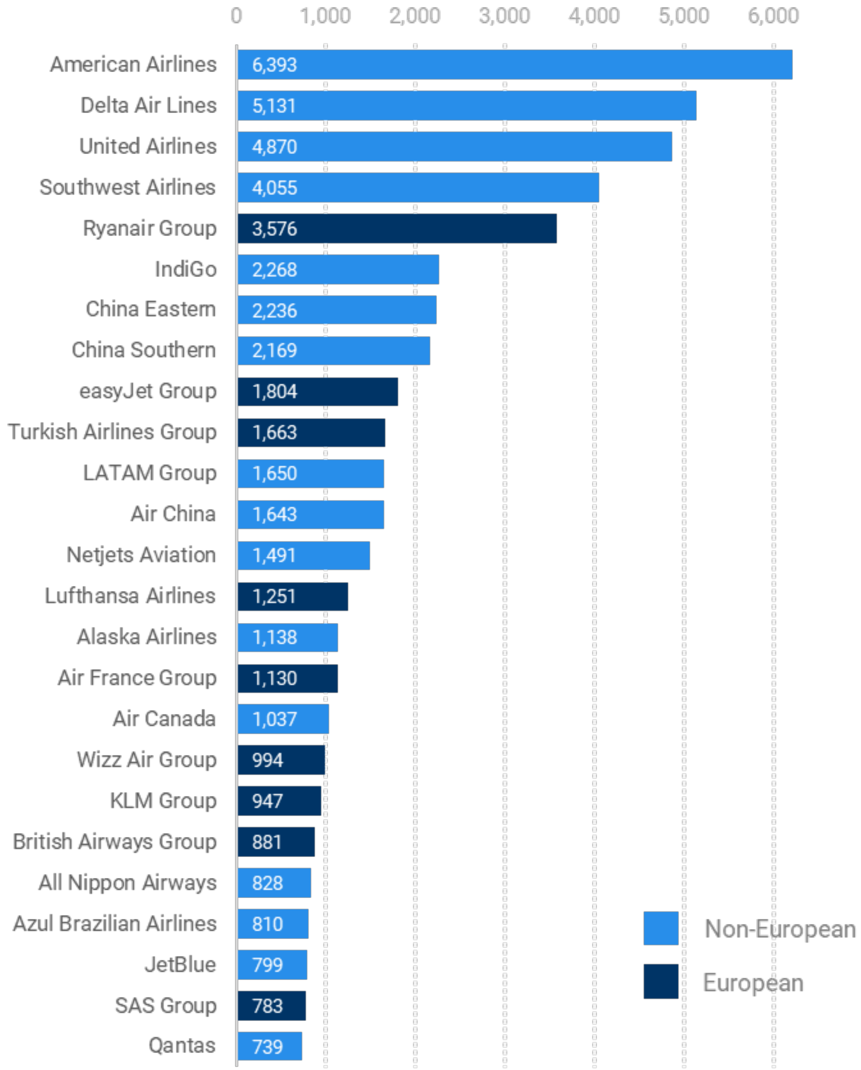
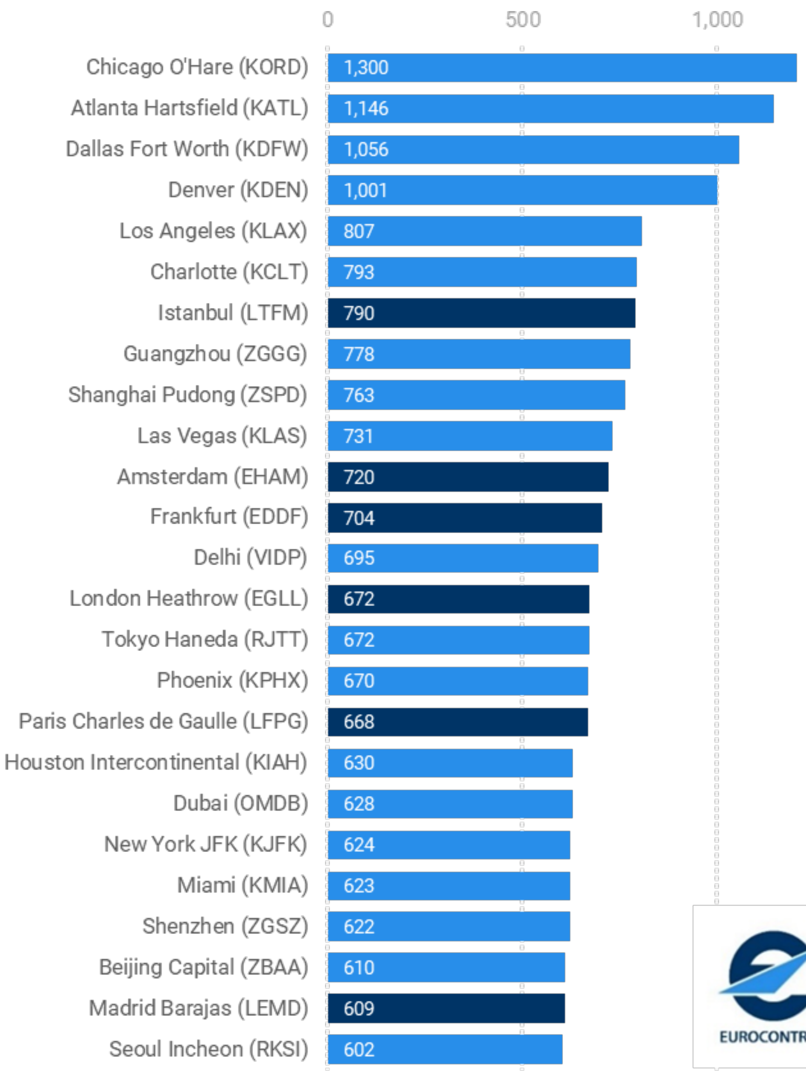
Top 25 global aircraft operators and airport departures

(average daily departure flights) **(Week 13-19 Oct 2025)**

Top 25 global aircraft operators



Top 25 global airports



Source: Flightradar24 Historical Global Utilisation data

- Over the last week, nine European **aircraft operators** were ranked in the top 25 global aircraft operators.
- Of those, three groups make it into the global top 10: Ryanair (5th), easyJet (9th) and Turkish Airlines (10th).
- Six more European carriers made the top 25, starting with Lufthansa Airlines (14th), Air France Group (16th), Wizz Air Group (18th), KLM Group (19th), British Airways Group (20th) and SAS (24th).

- Over the last week, six European **airports** made the top 25 in terms of global airport departures – a similar situation compared to the equivalent week last year.
- One airport makes the top 10, with Istanbul which ranked 7th.
- The other European airports to make the top 25 are Amsterdam (11th). Frankfurt (12th), London Heathrow (14th), Paris CDG (17th), and Madrid (24th).
- The top 10 global airports continue to be dominated by US airports: 7/10 are American, 1 European, and 2 Chinese: Guangzhou (8th) and Shanghai (9th).

Jet fuel price (Europe)

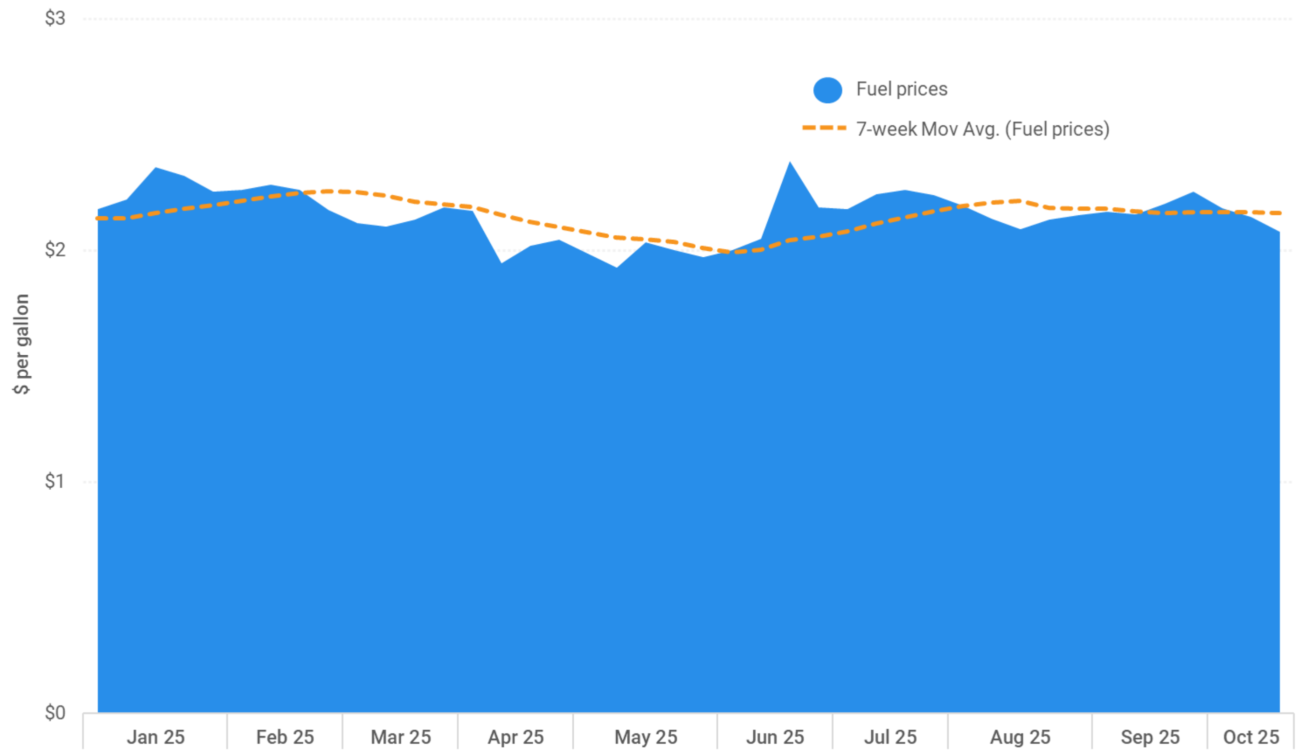
17 Oct 2025
avg fuel price:

$2.08 /gallon

-5%

vs. $2.18 /gallon
on 03 Oct 2025

Source: IATA/Platts

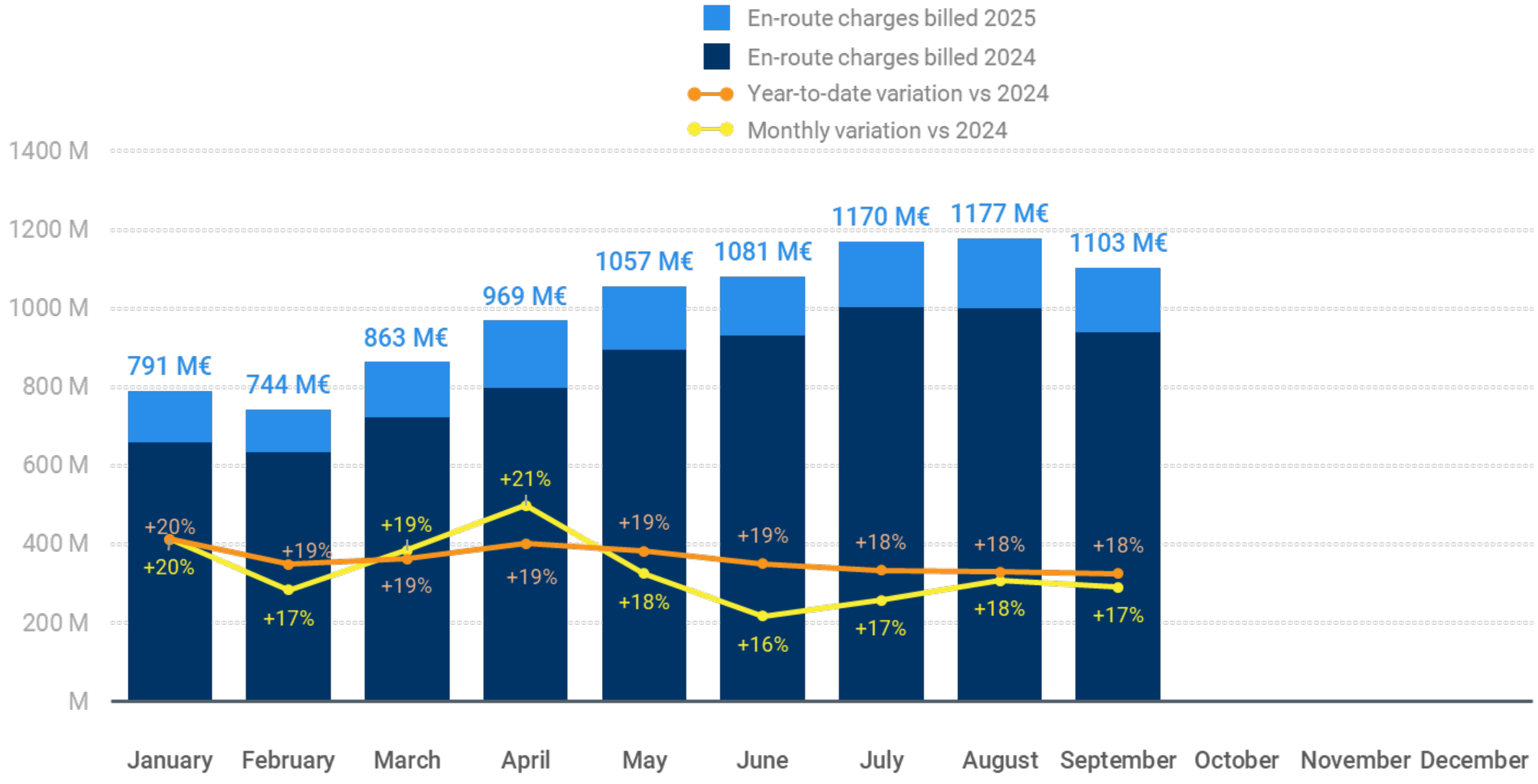


Source: IATA/Platts

- The average price of jet fuel closed at 2.08 USD/gallon on 17 October 2025, 5% lower than two weeks ago. By comparison, the highest price since the beginning of the year remains that of 20 June 2025, when the fuel price reached 2.39 USD/gallon.
- Context: the eight OPEC+ countries (Saudi Arabia, Russia, Iraq, UAE, Kuwait, Kazakhstan, Algeria and Oman) met on 5 July. In accordance with the decision reached on 5 December 2024 to start a gradual and flexible return to 2.2 million barrels per day, they implemented a production increase of 548K barrels per day in August 2025 over what they were scheduled to produce in July 2025. The gradual increases may be paused or reversed subject to evolving market conditions. This flexibility will allow the group to continue to support oil market stability.
- They also confirmed their intention to fully compensate for any overproduced volume since January 2024. The eight OPEC+ countries are holding monthly meetings to review market conditions, conformity and compensation. The eight countries met on 7 September and 5 October and decided to increase their production levels by 137K barrels per day for October and November amid persistent worries over a looming supply glut.

En-route air navigation charges for the EUROCONTROL Area (2025)

Year-to-date amount billed: 8,955 M€ (+18% vs 2024)



- At network level, 1,103 M€ en-route air navigation charges were billed in September 2025, +17% vs 2024 and +48% vs 2019.
- These changes were driven by the evolution of Unit Rates and of Service Units (i.e. depending on distance flown and aircraft weight).
- The 18% year-on-year increase in charges in September 2025 reflects an 11% increase in Unit Rates and a 5% increase in total en-route Service Units vs August 2024. The average distance per flight increased by 1%, while the average maximum take-off weight per flight remained stable.
- On a year-to-date basis, EUROCONTROL has billed 8,955M€ in route charges, 18% higher than in 2024 and 47% higher than in 2019.

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To further assist you in your analysis, EUROCONTROL provides the following additional information on a daily basis (daily updates at 8:45 CET for the first item) and every Friday for the last item:

1. EUROCONTROL Aviation Intelligence Portal:
   www.eurocontrol.int/Economics/
   This dashboard provides daily performance data on Day+1 for all European States; for the largest airports; for each Area Control Centre (ACC) and the largest airline operators.

2. EUROCONTROL Data App: Available at Android Play and Apple Store.
   This app provides daily performance data on Day+1 at network level and top stakeholders.

   Google Play   Apple Store

3. EUROCONTROL "Our Data" Portal:
   www.eurocontrol.int/our-data/
   This webpage provides an overview of key charts and publications related to European aviation performance.

4. Rolling Seasonal Plan:
   www.eurocontrol.int/publication/european-network-operations-plan-2025-rolling-seasonal-plan
   This Rolling Seasonal Plan covers a rolling six or eight-week period. It plays a major role in helping European aviation by providing key actors with the global view they need to plan effectively.

For more information please contact aviation.intelligence@eurocontrol.int

www.eurocontrol.int